



Request for Expressions of Interest  
for the Operation and Management of:

**Bascom Lodge  
Mt. Greylock State Reservation  
Adams, Massachusetts**





Commonwealth of Massachusetts  
Deval L. Patrick, *Governor*

Executive Office of Energy & Environmental Affairs  
Ian A. Bowles, *Secretary*

Department of Conservation & Recreation  
Richard K. Sullivan, Jr., *Commissioner*

Division of State Parks  
Priscilla Geigis, *Director*

Office of Cultural Resources  
Patrice Kish, *Director*

Historic Curatorship Program  
Kevin Allen, *Program Manager*

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# INTRODUCTION

The Massachusetts Department of Conservation and Recreation's (DCR) is pleased to release a **Request for Expressions of Interest** for the reuse and/or rehabilitation of **Bascom Lodge** at the summit of Mt. Greylock State Reservation in Adams, Massachusetts. The purpose of this document is to identify parties interested in managing and operating the lodge for park visitors when the summit is scheduled to reopen in the spring of 2009. Currently DCR is considering two different options:

OPTION A: Management of the lodge under a maximum five (5) year license

OPTION B: Rehabilitating and operating the lodge in return for credit towards a long term lease under the Historic Curatorship Program

DCR will use the results of this notice to solicit official Requests for Proposals from viable candidates. DCR seeks creative and innovative responses to this announcement for a compatible and publicly accessible use of one of Massachusetts' most significant sites.

Bascom Lodge has traditionally operated been operated by short term tenants (Option A). Interested parties would follow a standardized license agreement and would be responsible for limited maintenance. Tenants would also be responsible for utility charges. Under Option B, interested parties would invest in capital improvements in return for credit towards a long term lease on the property. See page 9 for more information on the Historic Curatorship Program.

The minimum requirement of any proposal for the management of Bascom lodge is to provide some level of quality healthy food, beverages and lodging to park visitors. Preference will be given to any proposal that also provides services or sponsors activities that are complimentary to the mission of the Reservation as a place for the study, appreciation and enjoyment of the area's natural and cultural resources and employs environmentally sustainable concepts in its operation.



### The purpose of this RFEI is to:

- Gauge the interest in Bascom Lodge
- Identify new rehabilitation and reuse potential opportunities and challenges
- Help develop Requests for Responses (RFR)

This document is a general description and call for interest and not a request for formal proposals. The RFR will include more detailed information than the RFEI, including more specific cost estimates and program requirements. Any party with an interesting and compatible idea for the operation of this property is encouraged to respond to this RFEI. Submission of an Expression of Interest will not be a prerequisite for submitting a formal proposal, nor will DCR consider information submitted at this time to be binding on the respondent. No decisions about the selection of a Curator/Tenant will be made until the completion of the Request for Proposals process, which is scheduled to take place in 2008.

### Estimated Timeline

Release of Request for Expressions of Interest	Fall 2007
Release of Request for Responses	Winter/Spring 2008
Tenant Selection Process	Summer / Fall 2008
Tenant Selection / Lease Negotiation	Winter-2008
Anticipated Opening Date	Spring 2009

Pre-RFR open houses will be held following the release of Requests for Responses to allow interested parties to better examine the property. Currently, Bascom Lodge and the access road are closed for the Parkway reconstruction project. Open houses will be held following the release of Requests for Responses to allow interested parties to better examine the properties. Feel free view these properties from the exterior. *Please do not inspect the interior of the property without Clebe Scott at (413) 449-4262. This property is not open to the public at this time and poses serious safety hazards.*

If you are interested in receiving an official Request for Responses (RFR), please submit a letter containing the information outlined below.

*"...Greylock, our daily pleasure, our constant symbol, our ever renewed inspiration, for all who have fellowship with Nature."*

John Bascom, 1906

## BACKGROUND / HISTORY

Few vistas can match the majestic scenery atop Mt. Greylock, Massachusetts' highest peak. In addition to its natural beauty, Mt. Greylock represents the state's earliest efforts to protect its natural heritage, establishing the Mt. Greylock State Reservation in 1898.

The centerpiece of the 12,000 acres Reservation is Bascom Lodge. Paired with the towering War Memorial, the rustic stone and timber lodge sits atop the mountain's summit and boasts 360 degree views of up to one hundred miles and five states.

Considered sacred for centuries by the native inhabitants of the region, English settlers began to farm the area around Mt. Greylock starting in the mid-eighteenth century. In the nineteenth century, scientists, tourists and literary figures such as Thoreau, Melville and Hawthorne were drawn to, and inspired by the mountain's magnificent setting. Industry came to the region in the second half of the 1800s, and increased timbering and the resulting degradation of the mountain inspired locals to work to preserve the area's natural integrity.



In 1898, the state legislature established Mt. Greylock as the Commonwealth's first State Reservation. The Mt. Greylock Reservation Commission improved access to the summit and upgraded recreational facilities. Work began on Bascom Lodge in 1932 and represented a unique period of history and architecture, a time when the Civilian Conservation Corps (CCC) helped to transform a generation of young men dispirited by the economic hardship of the Great Depression into a productive workforce. The CCC designed the lodge under guiding principles that recognized the natural and aesthetic value of the mountaintop setting. Its integration into the summit's contours, use of native materials and low profile typified the CCC design theory that shaped the identity of America's National and State park systems.



Bascom Lodge has served visitors to Mt. Greylock for seventy years, including through-hikers on the Appalachian Trail. Most recently the lodge has been operated under a license by groups such as the Appalachian Mountain Club and Nature's Classroom. The entire summit area is listed in the National Register of Historic Places.

## THE COMMUNITY

Mt. Greylock is located within parts of the communities of North Adams, Adams, Lanesborough, Cheshire, Williamstown and New Ashford. The surrounding towns and academic institutions make this corner of the state a destination for both natural and cultural pursuits. Berkshire County is ideally located, just 2 ½ hours from both Boston and New York City and offers a wealth of historic sites, museums, music, dance and art venues. In addition, the area also offers thousands of acres of recreational activities, from canoeing and kayaking to golfing, hiking, camping, mountain biking, and fishing. Winter sports enthusiasts are also close by to multiple alpine and cross-country skiing as well as snowboard venues.

## DEVELOPMENT NOTES

- Under either option, a potential tenant would at minimum, provide high quality, healthy food choices and lodging services for overnight and day visitors.
- DCR envisions any future reuse of the lodge to be seasonal, as has traditionally been the case. This does not preclude, however, a potential tenant from operating the lodge in some capacity during the winter months. Note, however, that a number of limiting factors exist, including the fact that the summit access road is closed in winter.
- The historic Mount Greylock Parkway is currently undergoing a major rehabilitation and public access to the summit will be restricted until the completion of the project, projected for spring of 2009. Ideally any reuse of the property would be open to the public and provide some level of service in time for the Parkway re-opening.
- The summit of Mount Greylock is an environmentally sensitive area, containing a number of protected flora and fauna. Any major construction efforts related to the rehabilitation of the lodge must consider these resources and comply with any state, local and federal regulations.
- Please note that DCR has recently partnered with the Town of Adams in the development of Greylock Glen. Phase I of the development concept includes a multi-use trail system, a campground, ancillary outdoor recreation and outdoor environmental art. DCR encourages reuse concepts that connect with development at the Glen.
- The most significant required rehabilitation elements include the restoration of interior and exterior finishes (including walls, floors, ceilings, shingles, trim, etc), window and door reconditioning and appliance and fixture upgrades.
- Mount Greylock State Reservation welcomes over 250, 000 guests annually.





## BUILDING DATA

- 5, 818 square feet
- Eight bunk and/or bedrooms
- One handicapped accessible bedroom and toilet room on first floor
- Living quarters for lodge manager
- Kitchen
- Dining room
- Enclosed porch
- Lobby
- Store area
- Fireplace
- Building can sleep 35 visitors, not including staff
- Includes use of 3 garage bays for storage
- Oil heat
- Functioning tight-tank septic system
- Well water with 15, 000 gallon storage capacity
- Functioning electrical system





# HISTORIC CURATORSHIP PROGRAM

Within the thousands of acres of the Commonwealth's Forests and Parks are a number of historically significant buildings with enormous potential for adaptive reuse. Without direct public funding, these mansions, houses and cottages have fallen prey to the elements and vandalism. The **Historic Curatorship Program** was established to address this issue through the formation of public-private partnerships. The program was launched in 1994 following the passage of enabling legislation (Section 44 of Chapter 85 of the Acts of 1994, amended by Section 50 of Chapter 15 of the Acts of 1996, and the 2002 Environmental Bond Bill).

Under the **Historic Curatorship Program**, DCR enters into a long term lease with a Curator/Tenant who pays rent in the form of services, specifically the rehabilitation and maintenance of the property. The reuse of these significant properties must be compatible with its context while enhancing the visitor's experience of the public park.

Properties in the Program range from mansions on the North Shore to cottages in the Berkshires. Average lease terms range from 20 to 30 years. To date, nine of the Program's properties are under agreement, totaling an investment of almost \$5 million from the private sector into state-owned historic properties.

Through the Program, a "Curator/Tenant" is selected to rehabilitate, reuse and maintain one of the Program's properties in exchange for credit towards lease payments in a "work for credit" system. This Request for Expressions of Interest is the first step in the process of identifying a Curator/Tenant. Based on information gathered through this analysis, a more formal **Request for Responses (RFR)** is issued, which includes more specific cost estimates and program requirements. A prospective Curator / Tenant will respond to the RFR with a formal proposal, and will be evaluated in an open and competitive selection process.



Glendledge Cottage, Rockport, Before and After



# Historic Curatorship Program

## *Frequently Asked Questions*



### **What is the maximum lease term and how is this determined?**

The primary intent of the Historic Curatorship Program is to obtain the rehabilitation and maintenance of historic slate park properties in exchange for a long term lease. For this reason the basic transaction contemplated under a Historic Curatorship lease is that the rent will be paid to the Commonwealth in the form of work and/or services. The Department has defined three types of investment which result in rent credit - improvements, maintenance and management services. Under this “work for rent credit” system, the investment made by the Curator/Tenant is deducted from the lease value for a property. Therefore depending on the amount of work required for a property, the lease term could range from 10-50 years or more. At the expiration of the lease, control of the property will revert back to the Commonwealth.

### **What are the financial requirements of a Curator/Tenant?**

The Building Conditions Assessment is the basis for determining the approximate cost of rehabilitating a property. Cash or sweat-equity, the non-monetary investment of time and labor, is an accepted method of capital investment and credit towards rent. When submitting a proposal, a confidential statement of financial capacity is required. This should demonstrate the Proponent’s ability to carry out the project. A statement describing the expected project costs and the anticipated sources of permanent financing and working capital is also required. Costs should reflect capital investment, as well as the value of any sweat-equity and other in-kind donation of services.

### **Do I have to pay property tax on the curatorship property?**

The Curator/Tenant is responsible for paying all applicable taxes and fees which may be associated with the property for the duration of the lease. It is up to the individual city/town in which the curator property is located to determine whether it will collect taxes on the property. While most cities and towns currently do not levy property taxes on curatorship properties, DCR cannot guarantee that they will not choose to do so in the future.

#### **Curator / Tenant Selection Criteria include:**

- Quality of overall proposal
- Demonstrated financial resources
- Demonstrated experience in restoration / historic preservation
- Compatibility with park setting / programs
- Quality of public benefit component

### **What type of insurance do I have to take out on the property?**

The Curator/Tenant is responsible for maintaining in full force sufficient insurance to cover costs of rehabilitating any partial damage or destruction of the property. Comprehensive liability insurance must also be maintained for all activities allowed under the lease. The value of the insurance which is beyond that normally required for a tenant may be creditable toward rent.

### **What will happen if the Curator/Tenant is unable to fulfill the requirements of the lease?**

DCR understands that a Curator/Tenant's life is subject to unforeseen changes which may prevent them from continuing with the curatorship of a property. In this situation each case will be reviewed on an individual basis with DCR reserving decision making authority. In the worst case scenario where the property's historic integrity is significantly destroyed by fire or other cause, DCR will terminate the lease. The Curator/Tenant, however, should not anticipate reimbursement for restoration work already performed on the property under any circumstances. DCR also has the right to terminate the lease if the Curator fails to comply with the terms and conditions of the lease agreement, abandons the premises, or declares bankruptcy.

### **What types of changes can I make to the property?**

In the application process, the prospective Curator/ Tenant will submit a proposed Implementation Plan, based on the guidelines of the Request for Responses. In consultation with DCR and the Massachusetts Historical Commission, the plan will become the framework for the rehabilitation. In the occasion of a proposed change outside the agreed-upon scope of work, projects must be reviewed by DCR in consultation with the Massachusetts Historical Commission to determine whether the change is compatible with the historic character of the property.

### **Do I have to restore the property right away, or can I phase the work over several years?**

The Implementation Plan schedule is not required to complete all required work in any specific period of time. However, it is expected that life-safety issues and major work, such as structural stabilization, be performed early in the lease. The efficiency of the implementation schedule is a factor in the Curator/Tenant selection process.

### **When can I have access to the property? Can I live in the house while restoring it?**

Once a Curator is designated, the Department is required by law to notify state and local officials of its intent to lease the property. During the notification period which ranges from 60-120 days, a lease is negotiated. Prior to the execution of a lease, a Curator/Tenant may occupy the property under a Special Use Permit, issued by DCR. Curator/Tenants are welcome to live in the house while restoring the property.

### **What is meant by "public benefit" or "management services"?**

Public benefit and management services is work not considered an improvement or maintenance service, which is over and above the passive occupation of the property by the Curator/Tenant.

#### **Examples of public benefit components:**

- Coordinating a senior's garden and farm tour
- Sponsoring a summer concert series
- Opening a garden to a local group
- Joint nature/history program with park/forest
- Allowing a local group meeting/event space
- Offering horseback riding lessons

### **How often will the property have to be open to the public?**

As stated in the enabling legislation for the Historic Curatorship Program, Chapter 85 of Acts of 1994, the property must be opened to the public no less often than twice each year "for the purpose of providing public access to the historic quality of the property." The method of opening the property will be determined in association with the Curator/Tenant

# SUBMISSION REQUIREMENTS

The Commonwealth invites all parties to respond to this Request for Expressions of Interest by submitting a brief narrative of the proposed reuse concept, a statement of qualifications and a brief outline of the feasibility of the proposed project. Responses should not exceed five (5) pages supplemented by no more than three (3) pages of graphic materials. Please submit responses before **January 30, 2008**. Specifically, the Expression of Interest should include the following:

## **OPTION A – Facility management under license (5 years or less)**

- 1) Cover letter
- 2) Brief explanation of management proposal
  - Describe operation plan
  - Describe, if any, proposed programs above and beyond the basic requirements of Option A (food, beverage and lodging)
- 3) Qualifications
  - Describe your role in the project
  - Provide a statement of qualifications and experience in facility management
- 4) Feasibility
  - Identify the type of end-users expected to utilize the property
  - Describe in general terms the type of financing proposed to implement the management
  - State the anticipated license term / period of operation

## **OPTION B – Historic Curatorship (long term lease; greater than 5 years)**

- 1) Cover letter
- 2) Reuse Concept
  - Describe the proposed reuse concept
  - Briefly describe the compatibility of the reuse with the character of the park
  - Describe, if any, proposed programs above and beyond the basic requirements of Option A (food, beverage and lodging)
  - State the impact of the proposed use on the historic resource
- 3) Qualifications
  - Describe your role in the project
  - Provide a statement of qualifications and experience in facility management and rehabilitating historic properties
- 4) Feasibility
  - Identify the type of end-users expected to utilize the property
  - Describe in general terms the type of financing proposed to implement the management and rehabilitation and of the property.
  - Briefly state the anticipated lease term

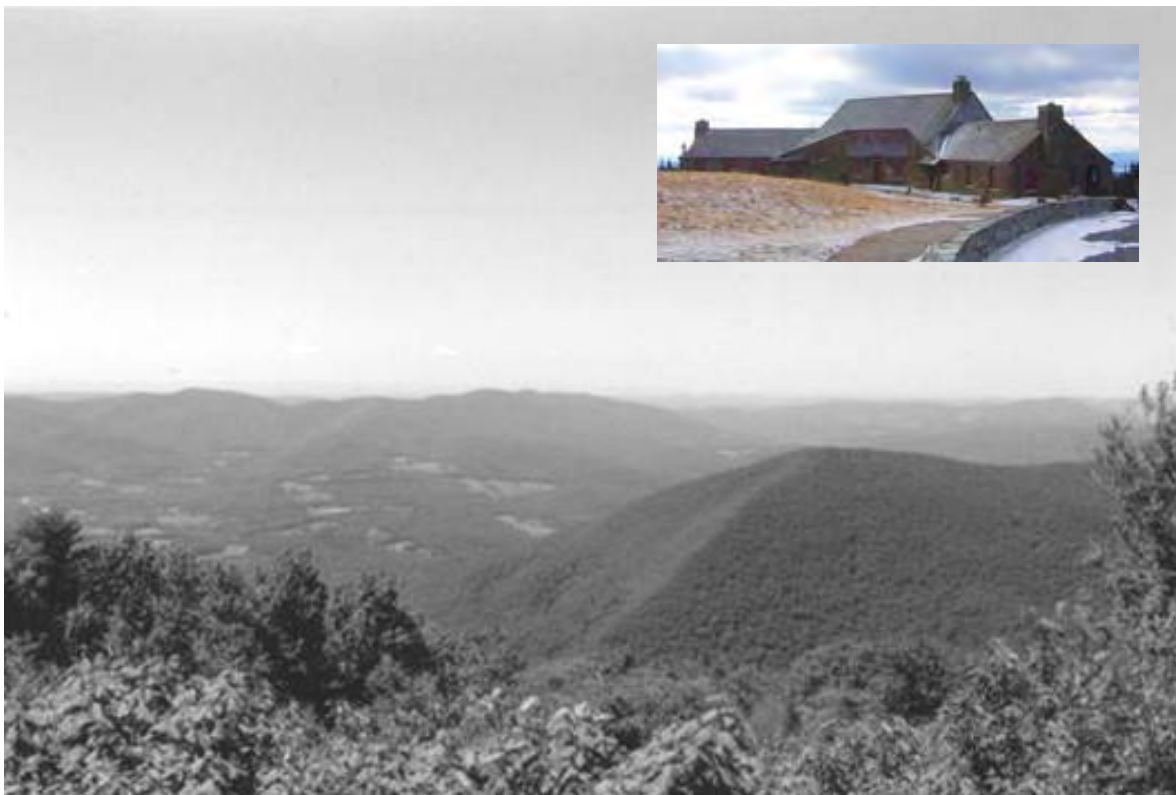
Submissions should be mailed to:

Kevin Allen, Program Manager  
Office of Cultural Resources  
Department of Conservation and Recreation  
7<sup>th</sup> Floor  
251 Causeway Street, Boston, MA 02114-2119

or emailed to [HPC.Requests@state.ma.us](mailto:HPC.Requests@state.ma.us).

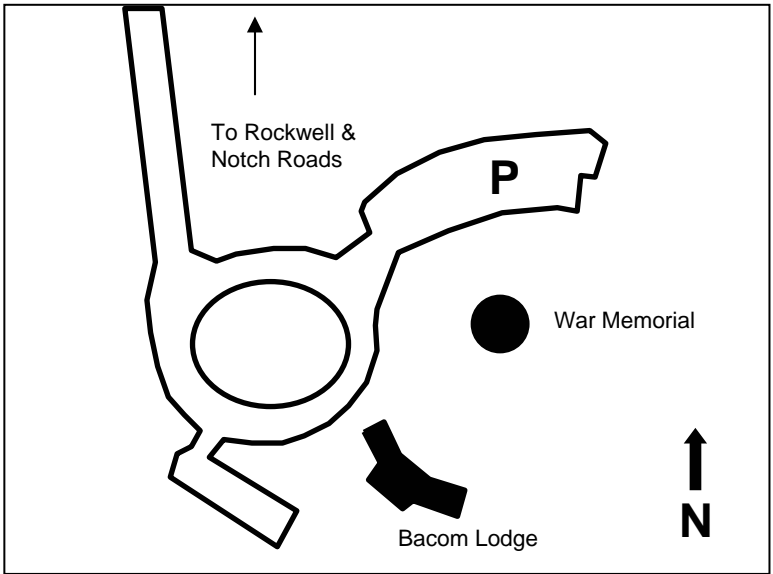
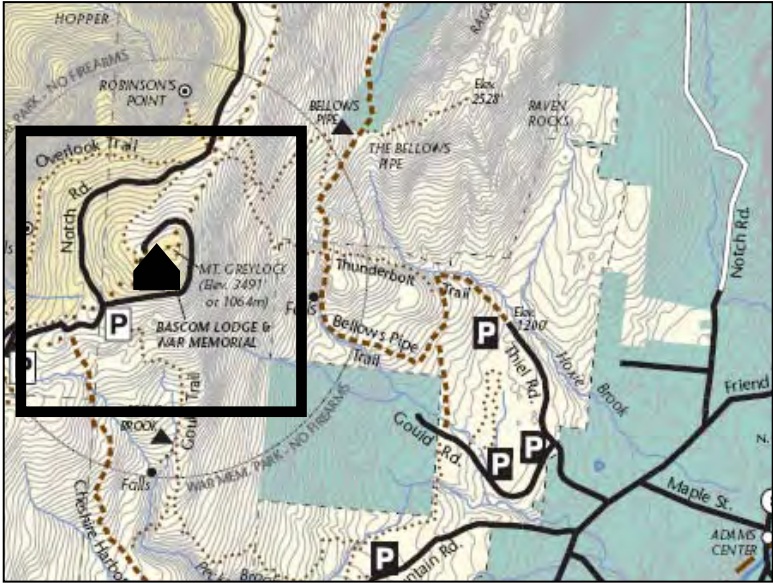
Responses to the RFEI are public documents and will be utilized by DCR to develop the Request for Responses (RFR) for the properties. Respondents understand that information provided may be used in whole or in part by the Commonwealth. Response to this RFEI does not legally bind the respondent to the Historic Curatorship Program or DCR in any way. Conversely, response to the RFEI is not a prerequisite for submission of a proposal through the RFR process. The Commonwealth and DCR appreciate your interest in the Historic Curatorship Program and welcome your comments.

Please contact the program for more information, either through the mailing address above or to [HPC.Requests@state.ma.us](mailto:HPC.Requests@state.ma.us).



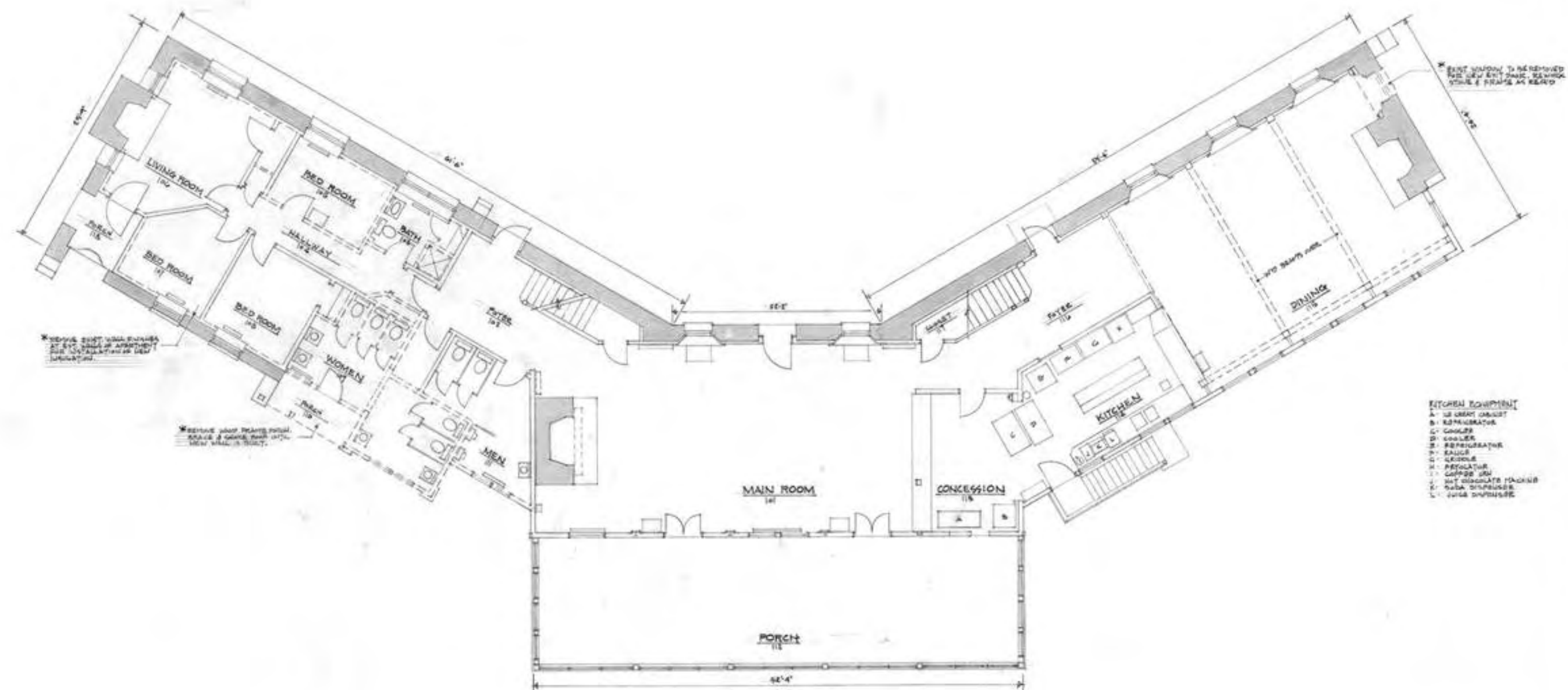


<p><b>Bascom Lodge, Mt. Greylock State Reservation, Adams, MA</b></p>
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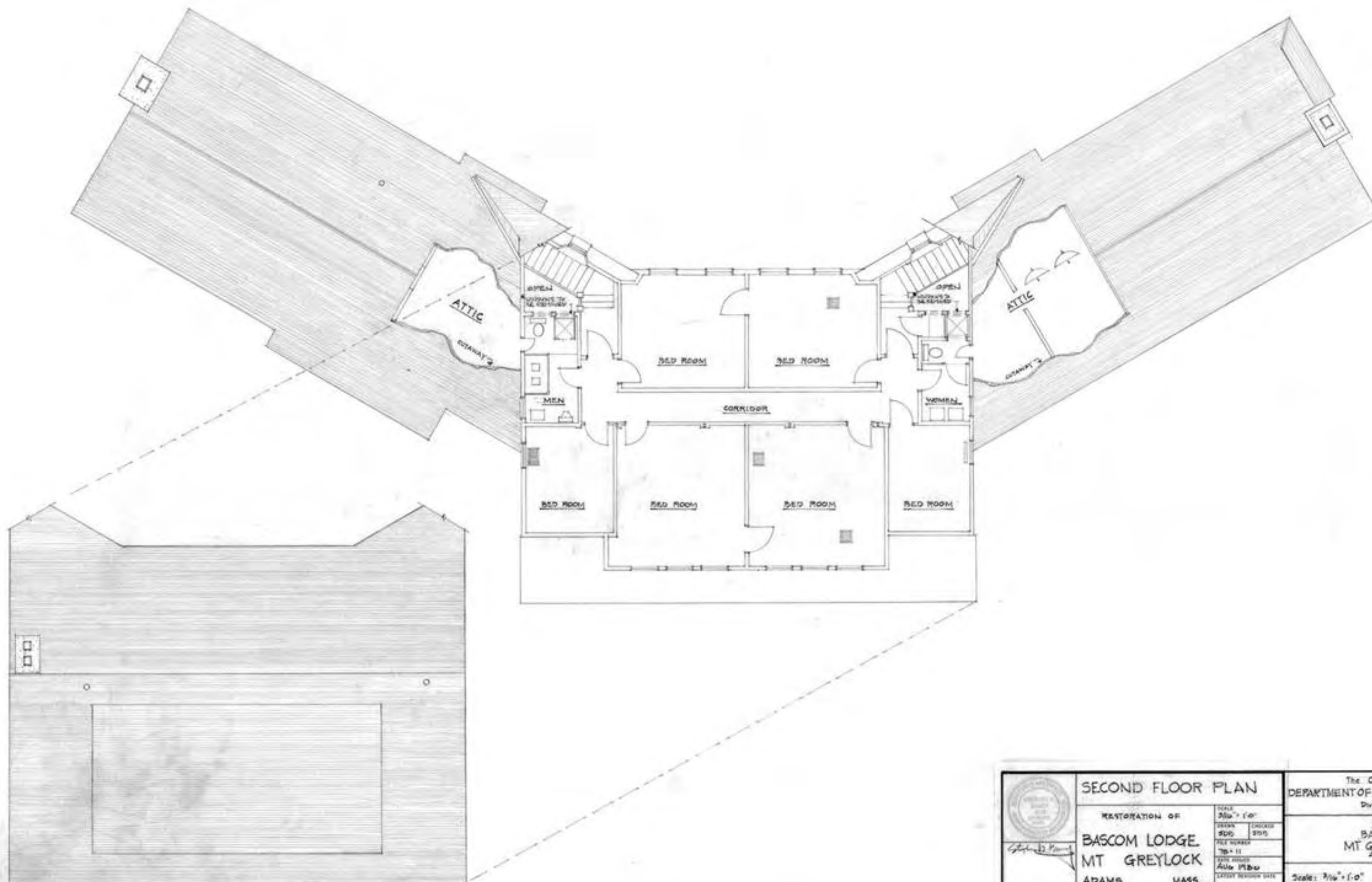


FIRST FLOOR PLAN



	<b>FIRST FLOOR PLAN</b>		The Commonwealth of Massachusetts DEPARTMENT OF ENVIRONMENTAL MANAGEMENT Division of Forests and Parks	
	RESTORATION OF <b>BASCOM LODGE          MT GREYLOCK          ADAMS MASS.</b>		AS BUILT DRAWINGS <b>BASCOM LODGE          MT GREYLOCK STATE RESERVATION          ADAMS MASS.</b>	
	SCALE: 3/8" = 1'-0" DRAWN: 5-0-5 CHECKED: 5-0-5 DATE: AUG. 1980 PROJECT: 120-18 CONTRACT: 120-18 DATE: AUG. 1980		Scale: 3/8" = 1'-0" Dwg. A-2 Project 120-18 Contract 120-18 Date Aug. 1980 Sheet 2 of 2	
	BARRY ARCHITECTS, INC. 27 WENDELL AVENUE PITTSFIELD, MASSACHUSETTS		<b>A-2</b>	

# SECOND FLOOR PLAN



	SECOND FLOOR PLAN		The Commonwealth of Massachusetts DEPARTMENT OF ENVIRONMENTAL MANAGEMENT Division of Forests and Parks	
	RESTORATION OF		SCALE 3/16" = 1'-0"	As NOTED Drawings BASCOM LODGE MT GREYLOCK STATE RESERVATION ADAMS MASS.
	BASCOM LODGE MT GREYLOCK		DRAWN SDG FILE NUMBER 75-11	
	ADAMS MASS.		DATE ISSUED AUG 1980 CHECKED SDG	
BARRY ARCHITECTS, INC. 30 WINDY HILL AVENUE ADAMS MASS.		PROJECT 120-75 CONTRACT 120-75 DATE: AUG 1980	Scale: 3/16" = 1'-0" Dwg. A-5	